

Introduction

Within AdvantageME, the BP54 and BP18 (for dollar amounts less than \$2500) contracts can also be created from the Document Catalog.

IMPORTANT INFORMATION ABOUT YOUR UNENCUMBERED CONTRACT: All unencumbered contracts with expiration dates after June 30, 2007 will need to be entered as a new CT document(s) in AdvantageME in order for you to make payments

Creating a CT Document from Document Catalog

against the contract(s) in FY08.

1. Log into AdvantageME.
2. Access the Document Catalog.
3. Click Create. Enter the following information:
 - **Document Code**—CT
 - **Document Department Code**
 - **Document Unit Code**—Enter the Workflow Unit
 - **Select Auto-Numbering**
4. Click Create.

Header Page

5. Enter the following information:
 - **Document Description**
 - **Procurement Type ID**
 - **Requestor ID**
 - **Shipping and Billing Location**

Vendor Page

6. Select **Vendor** from the Secondary Navigation panel. The Vendor page opens.
7. Enter the **Vendor Customer code** from the Pick List.
8. Select **Commodity** from the Secondary Navigation panel. The Commodity page opens.

Commodity Page

9. In the **General Information** area, the following information will infer:
 - **Commodity Code**
 - **CL description**
 - **Line Type** (Service)
 - **Contract Amount**
 - **Service From Date**
 - **Service To Date**
 - **Extended Description**

NOTE: If the **Line Type** is *Service*, the **Extended Description** field should be used to describe the scope of the work to be performed.

10. Click Ship/Bill to Lines. Expand the **Shipping/Billing** section to verify the information carried forward from the Header.
11. Select **Accounting** from the Secondary Navigation panel.

Accounting Page

12. Click Insert New Line.
13. Enter the **Event Type**.
 - ▶ Select PR05 if the amount is greater than \$2500
 - ▶ Select PR07 if the amount is less than or equal to \$2500
14. Enter the **Line Amount** (this is usually the same amount as the **Contract Amount** field on the Commodity line).
15. In the **Fund Accounting** area, enter the following information:
 - **Fund**
 - **Department**
 - **Unit**
 - **Sub Unit**
 - **Object**
16. Select **Save**.
17. Select **Validate**. If the system returns error messages, make the appropriate corrections and **Validate** again.
18. Select **Submit**. A message is returned, *Document submitted successfully*.

State of Maine Policies

The Process for Scanning Contracts is as follows:

- Note the unique identifying number next to the dept number at the top of the page.
- Department user hand writes the AdvantageME-assigned number in the upper right hand corner of the signed contract document and forwards three copies to Division of Purchases (DOP). (This will allow DOP to match the CT to the hard copy.)
- DOP reviews the hard copy contract and enters approvals in AdvantageME.
- DOP scans approved contracts into the FORTIS system and returns two approved documents to the department.
- Department will keep one copy for their records and send one approved copy to the contractor.

State of Maine Resources

Visit the AdvantageME Training Web Site for:

- Training Materials
- Video Demonstrations
- Help Desk Form
- AdvantageME Newsletter

For immediate assistance, contact the Help Desk at (207) 624-7700.

AdvantageME Financial Management System



Creating Service Contract (CT) Documents from the Document Catalog

Quick Reference Card